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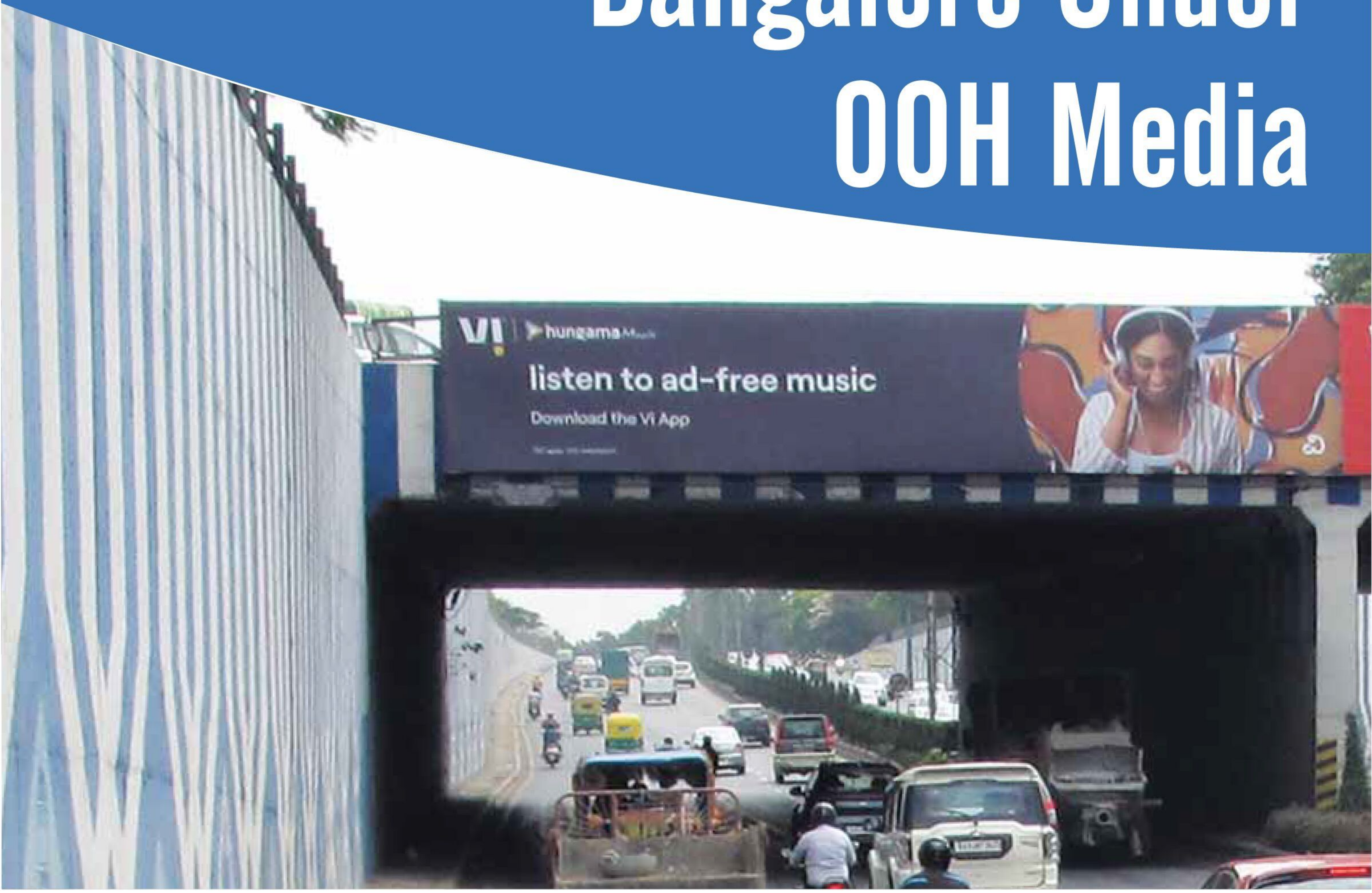
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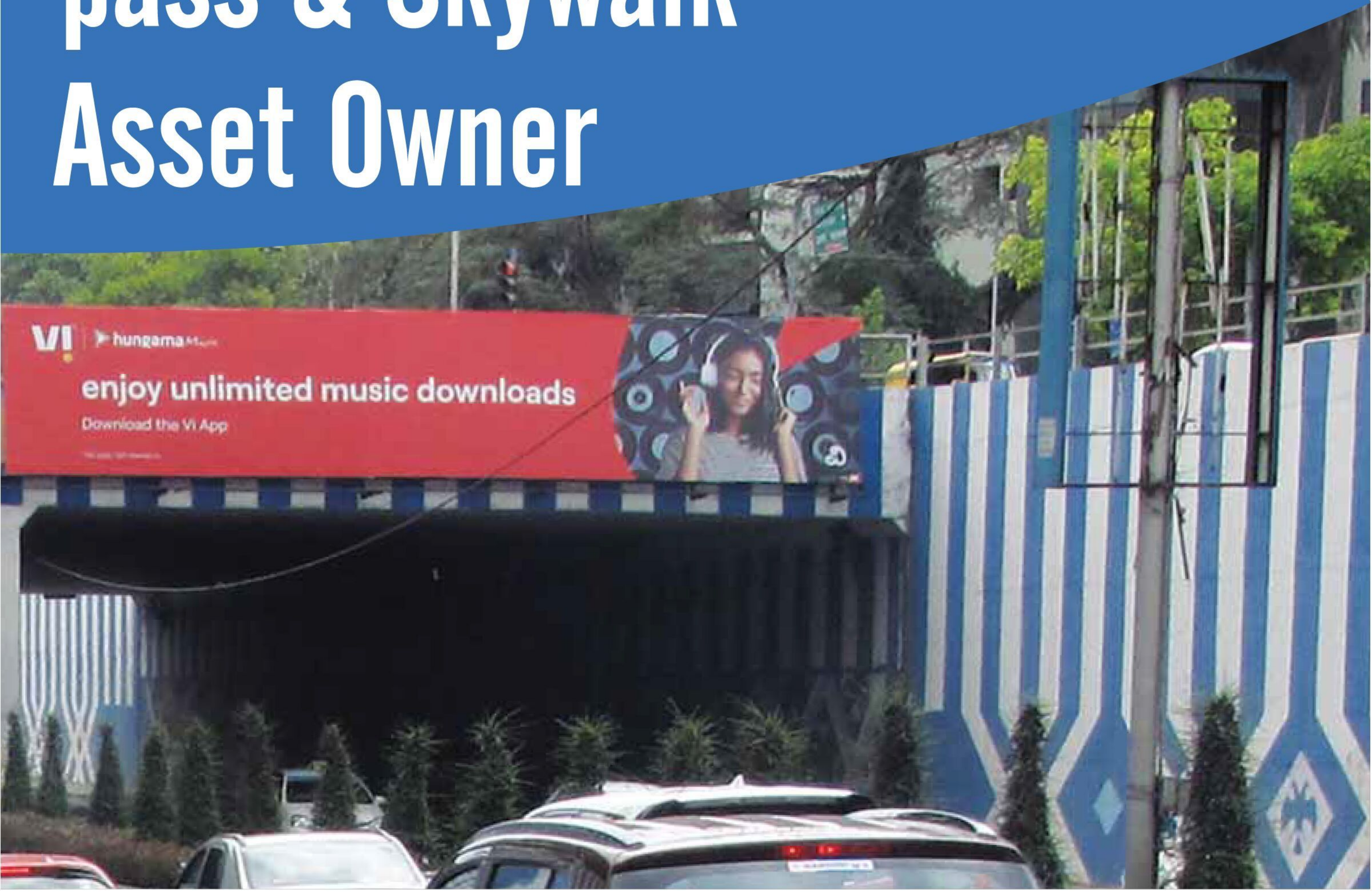
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Smart Matters

The Union Government's recent announcement that 22 Smart Cities will become fully functional by March presents an opportune occasion to revisit the potential business opportunities for OOH in smart city operations. In a TechTalk organised some time ago by the Out of Home Advertising Association of America (OAAA), Michael Galkin, Director of Marketing and Research, Branded Cities had said that as more cities look to be models in the technological age OOH has a defining opportunity to reinvent advertising for a whole new generation of individuals. For instance, smart cities have high use of sensors that generate large amounts of data that in turn can be harnessed for hyper-targeted messaging.

OOH firms engaged in smart city projects could also contribute to the setting up of and maintenance of systems like environmental sensors that collect data on air pressure, dust particles, NO2, CO2, CO levels, audio devices that record noise levels at particular locations, surveillance systems, emergency systems, and high speed internet connectivity for people on the move. Public private partnership projects that involve the delivery of smart solutions to community is a great way to firmly lodge OOH in a city infrastructure, thus taking away the uncertainties that often bedevil this business in different cities.

Indian OOH's thrust on digitalisation sets the stage for the industry's deeper engagement in smart city projects. In this edition, we have featured interviews with Scott Krantz, CEO of Los Angeles-based WOW Media, and Jun Sakurai, CEO of Japan's LIVE BOARD who bring forth the myriad ways that DOOH augments the city skyline and delivers high value to advertisers. We have also presented an overview of the high potentials of railway media as India sees a makeover of railway infrastructure and train services.

Happy reading!

RAJIV RAGHUNATH
Managing Editor

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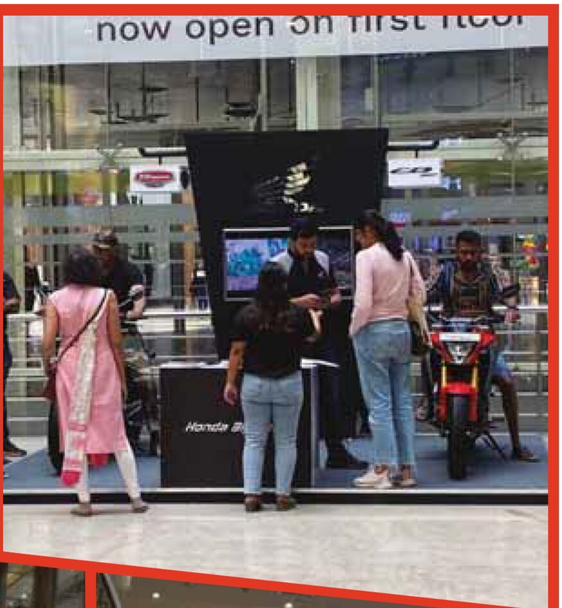
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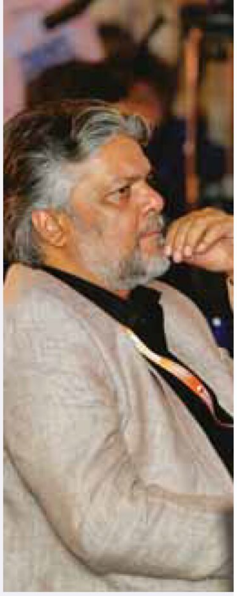

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Moving the wheels of change

Introduction of high speed trains, modernization of railway stations and upgradation of passenger services are all contributing to a makeover of the railway media environment.

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Vande Bharat on the move!

By M4G Bureau

Transit media has been the veritable engine of growth for Indian OOH, accounting for nearly a half of the industry's annual revenues, except for the years lost to Covid-19 pandemic when the transit systems – airports, railway networks, Metro rail networks, bus and cab services – lost much of the momentum. Today, as the country sustains its post-Covid economic recovery, transit systems are once running at near capacity, and new transit infrastructure projects are also being unveiled. These developments have also augured well for transit media business.

While airport media business has principally powered the transit media business growth, supported by Metro rail media business expansion, looking ahead, railway media could plan an instrumental role in placing transit media on a high growth trajectory.

One of the pre-requisites for any media business is a large audience for advertising. Indian Railways records massive passenger traffic volume every year that translates into a large audience for advertising in what is a highly controlled media environment – by way of advertising displays inside railway stations, and in-train branding. In addition, there are also media formats like exterior train branding, and outside station media units, that are also preferred formats for various advertisers.

A large audience in a controlled environment

Indian Railways, which started its service 169 years ago, more precisely on April 16, 1853, is the one of world's largest movers of passengers. The railway network has carried passengers that add up to the size of world's population, as is evident in Figure 1. In 2012-13, Indian Railways carried 8.42 billion passengers, whereas the world's estimated population for that year was 7.2 billion.

In the period 2011-12 and 2019-20, Indian Railways consistently moved 8 billion plus passengers every year, which then declined to a low of 1.25 billion in 2020-21 in the face of the Covid-19 outbreak when a large number of train services was halted. Year 2021-22 saw a recovery of passenger volume, at 3.51 billion, thereby doubling the number for 2020-21, as various trains were back in service.

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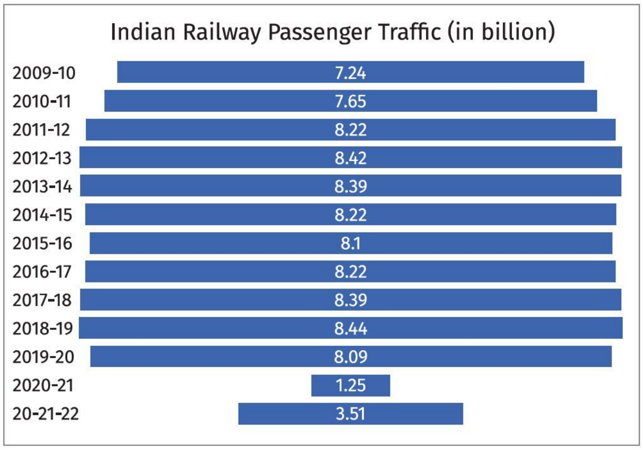
Fig 1: Indian Railway Passenger Traffic Volume (2019/10 – 2021-22)



Pertinent to note that the higher passenger traffic volume on a monthly basis was recorded back in June 2014 at 858 million.

Year 2022-23 saw a steady recovery in passenger traffic volume, with January 2023 recording 575.2 million, from 562.7 in December 2022.

Brand presence

As the second largest railway network in the world in terms of billion passenger-kilometers (1,157 in 2019), just after China, the railway environment ticks most boxes as a highly attractive advertising destination, and yet down the decades brand participation in railway media has been tepid at best, with many national brands and those that are seemingly directed at high income bracket keeping away from railway media.

In the discussions that Media4Growth has had with various media owners and buyers, the takeaways are that high-end brands do not see merit in advertising in places where regional and local brands are seen in greater number. Moreover, the advertisers and media buyers are also not seen to be looking at the audience size per se when they give a fleeting glace at railway media as a likely option for rolling up campaigns.

The perception that railway media is not suitable for national brands for advertising, seem to overshadow any data points that may be collated and presented to demonstrate the advantage of using railway media for running brand campaigns.

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As a result, most railway advertising are undertaken by government agencies or brands from particular categories like hosiery.

In this situation, it is incumbent on the commercial divisions of railway zones, along with the media owning firms that have taken up railway media contracts, to promote the core advantages of railway media for advertising, and pitch those suitably to the media planners, advertisers and buyers.

It would also be in the fitness of things for an joint initiatives for knowledge exchange and collaborations. At a high level, Railways is taking various steps to make the railway infrastructure comparable with those of airports. Efforts are also underway to enhance the passenger traffic volume, and take it to over 12 billion a year by 2030.

The National Rail Plan-2030, which has provided for the aforementioned target for passenger volume, has also laid down the need to speed up passengers and goods train, scrap low footfall halts of trains, introduce private trains, give a seat on demand to passengers by doing away waiting list problems, etc.

To make the passenger service more dynamic Indian Railways has introduced the 'Ideal Train Profile' to maximise the capacity utilisation and revenue generation in reserved mail express trains by regularly analysing the demand pattern of every single train. The Ideal Train Profile -- a seat capacity optimisation decision support -- is done due to the fact that the number of ticket-class combinations on a single train journey date can exceed Rs 5,000.

Budget 2023-24

The steps for upgradation of railway infrastructure and services received a major boost in the Budget 2023-24 that was presented in the Lok Sabha by Union Finance Minister Nirmala Sitharaman on February 1.

The FM announced that this time the budget allocation to the Indian Railways has been the highest in history. In the year 2013-14, Railways was allowed a share of Rs 28,174 crore and in 2022-23, it got a share of Rs 1,59,100 crore. Now, Rs 2,40,000 crore has been provided to the railways in the financial year 2023-24.

Faster, better trains

Earlier, while presenting last year's Union Budget, the FM had announced that 400 new-generation Vande Bharat trains will be developed and manufactured in a 3-year timeframe. In recent months, a number of Vande Bharat express trains have been introduced. This high-speed train is now operational on different routes.

Sir M. Visvesvaraya Terminal, Bengaluru railway station

Building on these gains, Railways is now planning to launch Vande Metro services on the lines of Vande Bharat trains. This was announced by Railway Minister Ashwani Vaishnaw after the presentation of Union Budget 2023 by the FM in Parliament. The Vande Metro, a mini version of the Vande Bharat Express trains, will be developed by the Railways for people living around big cities to travel to move between their place of work and hometowns.

Railways has also come up with a special tour Garvi Gujarat to showcase the cultural and Spiritual Heritage of Vibrant Gujarat State by running its Bharat Gaurav Deluxe AC Tourist Train.

This special tourist train, operated by IRCTC, will depart on 28 February from Safdarjung railway station in Delhi on the eight-day tour. The train will stop at Gurugram, Rewari, Ringas, Phullera and Ajmer railway stations from where tourists can board or deboard the train.

This train tour package has been designed on the lines of government of India scheme of "Ek Bharat Shrestha Bharat" conceptualised on the life of Great Freedom Fighter Sardar Vallabh Bhai Patel. The first stoppage of this train tour package has been kept at Kevadiya wherein the Statue of Unity will be the centre of attraction. The entire train will cover a distance of 3,500 km during the course of the eight-day journey.

In addition, Railways will soon run a special train for pilgrims, connecting Ayodhya in Uttar Pradesh to Janakpur in neighbouring Nepal. The route - using its Bharat Gaurav Deluxe AC Tourist Train - will include visits to Nandigram, Sitamarhi, Kashi and Prayagraj. The route is set to start from February 17 this year.

The focus on tourism will add a new dimension to the railway media reach, which would be of the essence to advertisers and media buyers.

To facilitate the introduction of high speed trains, Railways is reportedly readying a plan to build elevated high speed tracks for running passenger trains on popular routes such as Delhi-Jaipur, Mumbai-Pune, Bengaluru-Chennai and Delhi-Amritsar via Chandigarh. Railways has directed heads of different zones to carry out studies for laying such tracks that can be used for intercity fast train services. Most of the routes identified are in the range of 200 to 300 kilometres and there is high demand for premium train services.

Railway station modernisation

Railway station modernisation has been the stated goal of Railways for a few years now. Until 2021, the Indian Railway Stations Development Corporation was tasked with the redevelopment of railway stations and development of

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MANY A MILESTONE

- With over 68,000km, the Indian Railways is the world's 4th largest railway network, followed by the US, China and Russia.
- Indian Railways owns four UNESCO recognised world heritage sites. They are Darjeeling Himalayan Railway (inscribed in 1999), Chhatrapati Shivaji Terminus, Mumbai (inscribed in 2004), Nilgiri Mountain Railway (inscribed in 2005), and Kalka Shimla Railway (Inscribed in 2008).
- Indian Railways has 34 operational and 3 under construction Rail Museums, Heritage Gallery, Art Gallery and Heritage Park in different cities of India. These sites preserve and promote rail tourism.
- Indian Railways owns 5 royal trains named Royal Rajasthan on Wheels, Palace on Wheels, The Golden Chariot, The Maharajas' Express and The Deccan Odyssey. Among them, the Palaces on Wheels is the oldest luxurious train.
- Indian Railway built the world's highest rail arch bridge with steel and concrete over the Chenab river. It is at the elevation of 1,178 feet from the river.
- Railways employs approx.. 1.4 million people in India, making it one of world's largest employing companies / institutions.
- Indian railways still use its oldest working Locomotive, Fairy Queen, for the ride. The locomotive works with a steam engine that runs as a tourist train between Delhi to Alwar. The train was built in 1885 and retired in 1909. In 1997, the Fairy Queen was relaunched. Presently, it travels at a speed of 40km/h.

greenfield stations. However, it was shut down in 2021. But that has not slowed down the modernisation drive.

In June 2022, Prime Minister Narendra Modi inaugurated the Sir M Visvesvaraya Railway Terminal in Bengaluru, which boasts airport-like facilities. The terminal at Baiyappanahalli is a result of the Centre's ambition to modernise railway stations. Prominent features and services, which have drawn comparisons with Kempegowda International Airport, include seven platforms, a fully air-conditioned lobby, parking space for 900 two-wheelers and 250 four-wheelers.

Railways is now working on a mission mode to redevelop the major railway stations across the country to enhance the passenger experience. In this context, Maharashtra's Chhatrapati Shivaji Maharaj Terminus (CSMT) railway station is being redeveloped by preserving the grand heritage of the world famous iconic structure to its past glory.

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Prime Minister Narendra Modi laid the foundation stone for the transformation of the Chhatrapati Shivaji Maharaj Terminus. The modernisation was planned with a view to decongest the southern heritage node of the terminus, augmentation of facilities, and better multi-modal integration.

Financial Express reported on January 20, 23, that "the redeveloped station will be a sustainable green building equipped with solar energy, water conservation and recycling, STP, and solid waste management. The station will be integrated with the metro line. On transformation, the CSMT will be featured with the suburban and long distance concourse. The station premise will have 102 lifts, 78 escalators and 12 travelators. The station will also have a 25 meters wide Skywalk connection. It will also house all passenger amenities at one place along with spaces for retail, cafeterias, recreational facilities connecting all sides of buildings and all platforms."

To ensure proper safety and security in one of the busy railway stations in Mumbai, the authorities will install CCTVs cameras at different locations across the premises. The Chhatrapati Shivaji Maharaj Terminus (CSMT), a Unesco World Heritage Site is the first terminus station in the country.

In a similar vein, the Jaipur Railway Station will be modernised at a cost of Rs 717 crore. Railways Minister Ashwini Vaishnaw said Railways is carrying out the exercise taking into account both heritage and development.

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The WOW Factor

Scott Krantz, CEO of Los Angeles-based WOW Media, a leading operator of iconic DOOH media sites and a pioneer of traffic-facing, large format full motion displays, talks about the company's business journey to the top, in an interview with **Rajiv Raghunath**. Edited excerpts:

> “Some brands, such as fast-food chains, entertainment companies, and sports brands, have embraced full-motion displays as a way to showcase their products.”

You have a long association with OOH, having started your journey on the outdoor advertising landscape back in 1999 when you founded Mediacom Outdoor Advertising. How would you view your business journey of two decades up to the point where you are today, as CEO of WOW Media? If could throw light on the major milestones.

It’s certainly been a journey. I’ve done several different types of advertising in Los Angeles, from building 500 pay telephone advertising kiosks to 250 freestanding poster panels to wildposting to supergraphics, to 1,000 digital screens in 400 college bookstores around the country. Some were a great success and others a total financial failure, but all were a great learning experience, which lead me to be able to create WOW Media. Without these experiences, I don’t think I would have been able to build WOW Media 20+ years ago.

Under the WOW Media banner, you have created iconic and unique DOOH media sites that today engage top brands for their campaigns. Given that it is never so easy to set up and operate traffic-facing large format DOOH screen owing to various inhibiting regulatory norms, how did you navigate this path?

To set up and operate a traffic-facing large format DOOH screen, I had to be aware of and comply with various regulatory norms such as zoning laws, building codes, and advertising regulations. It's important to research and understand the specific regulations in the area, and to consult with legal and industry professionals if necessary. Having a thorough understanding of the regulations and obtaining the necessary permits and approvals help ensure a smooth set-up and operation process. Additionally, building strong relationships with local authorities and having a clear plan for the management and maintenance of the DOOH screen helps overcome any potential regulatory hurdles.

WOW Media is a forerunner in operating centre read, full motion DOOH advertising screens. How would one strike a balance between creative freedom and regulatory checks when running full-motion DOOH campaigns?

Balancing creative freedom and regulatory compliance when running DOOH advertising campaigns can be achieved by following some best practices:

- **Know the regulations:** Stay up to date on local, state, and federal regulations, including zoning laws, building codes, and advertising standards. This will help you understand what is allowed and what is not allowed on your DOOH screens.

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- **Work with legal and industry professionals:** Consult with lawyers, industry experts, and other relevant professionals to ensure that your campaigns are compliant with all relevant regulations.
- **Develop a clear content policy:** Create a content policy that outlines what types of content are allowed on your DOOH screens and what types of content are prohibited. This will help ensure that your campaigns are both creative and compliant.
- **Build relationships with local authorities:** Building strong relationships with local authorities and having open lines of communication can help ensure that any concerns or issues are addressed promptly and effectively.
- **Monitor your content:** Regularly review and monitor your DOOH campaigns to ensure that they are in compliance with all relevant regulations.

By following these best practices, we were able to arrive at a balance between creative freedom and regulatory compliance, ensuring that WOW's DOOH advertising campaigns are both engaging and compliant.

Are there any ongoing challenges?

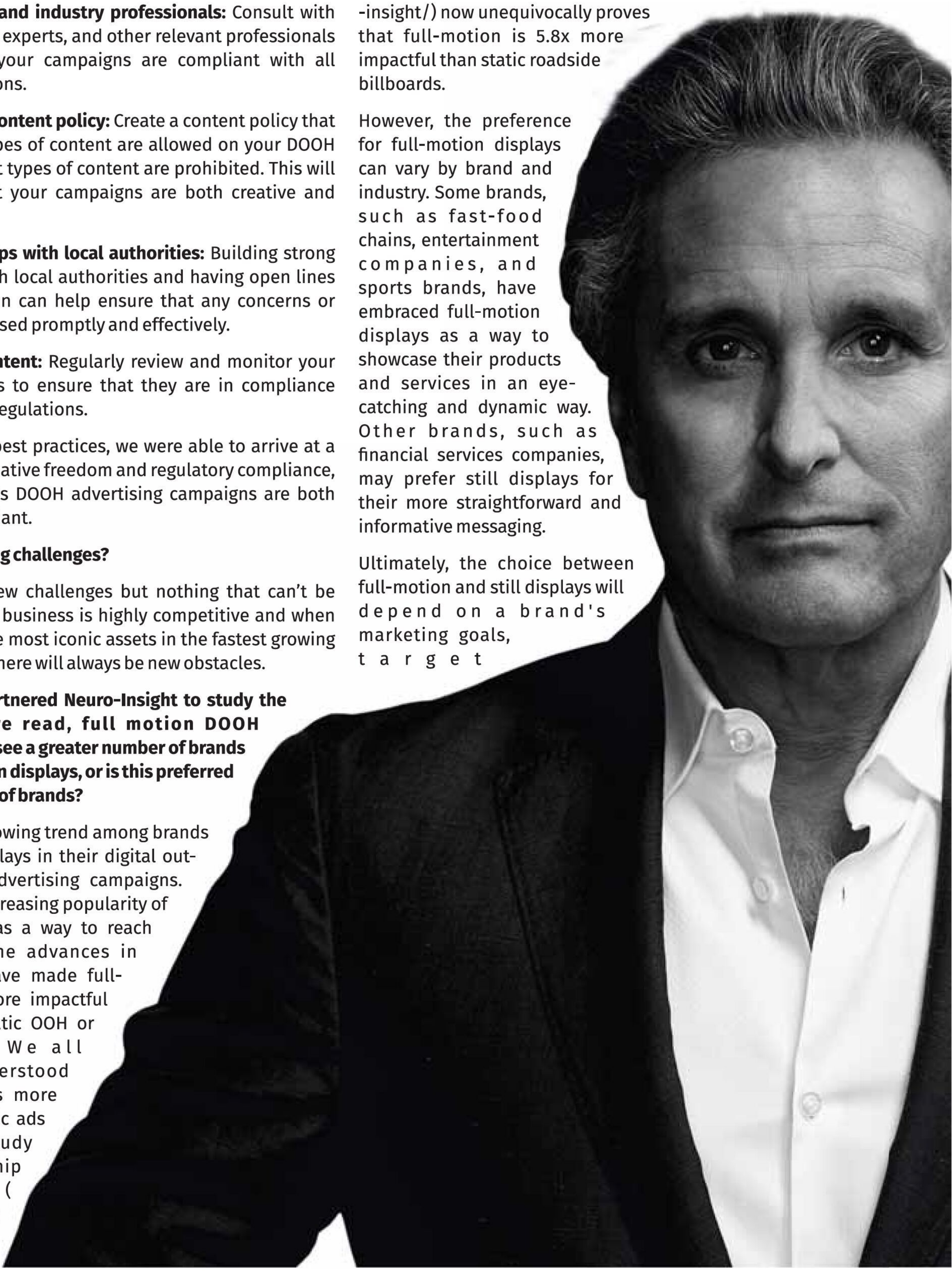
There are always new challenges but nothing that can't be overcome. The OOH business is highly competitive and when you own some of the most iconic assets in the fastest growing area in Los Angeles there will always be new obstacles.

WOW Media has partnered Neuro-Insight to study the efficacy of centre read, full motion DOOH advertising. Do you see a greater number of brands opting for full motion displays, or is this preferred by a particular band of brands?

There has been a growing trend among brands for full-motion displays in their digital out-of-home (DOOH) advertising campaigns. This is due to the increasing popularity of DOOH advertising as a way to reach consumers and the advances in technology that have made full-motion displays more impactful than traditional static OOH or static DOOH. We all instinctually understood that full-motion is more impactful than static ads but the recent study done in partnership with Neuro-insight (https://wowmedianetwork.com/neuro-insight/) now unequivocally proves that full-motion is 5.8x more impactful than static roadside billboards.

However, the preference for full-motion displays can vary by brand and industry. Some brands, such as fast-food chains, entertainment companies, and sports brands, have embraced full-motion displays as a way to showcase their products and services in an eye-catching and dynamic way. Other brands, such as financial services companies, may prefer still displays for their more straightforward and informative messaging.

Ultimately, the choice between full-motion and still displays will depend on a brand's marketing goals, target



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audience, and budget, as well as the type of message they want to convey. Some brands may choose to use a combination of both, depending on the campaign and target audience.

As the DOOH world goes increasingly programmatic, are iconic DOOH media assets cut out for programmatic buying, and would you worry about the 'race to the bottom'?

Programmatic buying is becoming increasingly popular in the digital out-of-home (DOOH) world as it provides more efficient ways for brands to quickly reach their target audiences. Premium DOOH like WOW Media's assets can certainly participate in programmatic buying, but they face some challenges in doing so.

One of the challenges is that programmatic buying often relies on real-time bidding, where advertising inventory is sold through a blind auction process. In other words, brands don't know whose assets they are buying. This can result in lower prices for advertising slots and potentially reduced revenue for DOOH media owners. For this reason, we stay away from programmatic, but we do participate in the Private Market Place (PMP) programmatic because this allows WOW Media to be separated from the less expensive DOOH inventory. It's like the saying goes, "you get what you pay for".

However, despite these challenges, WOW Media has embraced programmatic buying with our own proprietary solution as a way to reach a wider audience by creating it's on self-service buying platform called WOW NOW *(https://wowmedianetwork.com/wow-now/)* where brands can search and book exclusively WOW's inventory instead of contacting our sales team.

As for the "race to the bottom" in terms of pricing, this is a common concern in any industry undergoing a shift to programmatic buying. However, by focusing on delivering high-quality premium digital assets, WOW can differentiate itself and command a premium for our advertising inventory. Don't get me wrong, I believe that programmatic has its place. In fact, at my old company On Campus Media, we were one of the first companies to work with Vistar Media, one of the leaders in programmatic buying, and it worked well but we were not a premium product. Unfortunately, as of today, programmatic and premium inventory is like oil and water. Hopefully, one day that will change.

Are you planning to increase your business footprints beyond the markets that you address currently, and would you also look at collaborations across global OOH markets?

Yes and yes. We recently added a Minister of Schmoozing and International Enlightenment (aka VP of International Business Development) to our team for exactly that exact purpose. We've seen an increase in international business because WOW's inventory is in the 2nd largest media market in the US, situated outside Los Angeles International Airport (LAX) which is the gateway to Los Angeles, adjacent to some of LA's (and the worlds) greatest attractions like Sofi Stadium, the Kia Forum, and soon the Intuit Dome in 2024.

WOW is the exclusive provider of digital media in the epicentre of sports and entertainment so it's only natural that international brands would want to promote their products and services on WOW Media's network.

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‘We want to be the only player that connects Japan and the world’

Jun Sakurai, CEO of LIVE BOARD, Japan’s foremost DOOH ad network publishing service that enables demographic targeting and measures the number of impressions, shares his perspectives on the business growth trajectory, prospects of pDOOH and globalisation of business, in an interview with **Rajiv Raghunath**. Edited excerpts:

Would you reckon that DOOH has an instrumental role in boosting overall OOH share of the ad pie? Please share the LIVE BOARD outlook for your addressable markets.

Digitalisation has streamlined conventional complicated OOH operations and reduced the workload of media owners and agencies. Ad Network has made it possible to distribute advertisements in many places at the same time. The programmatic world has made it possible to flexibly choose the time and place for delivery depending on the target, and further to the weather and temperature. Now, DOOH can do the same things as TV and digital. LIVE BOARD is a perfect platform that makes it possible to measure the impression in accordance with global standards, planning such as target analysis, programmatic distribution, and attribution of the campaigns in a one stop solution by utilising abundant mobile data. It is an effort to increase the ratio of OOH based on DOOH.

As the foremost adtech company in Japan's DOOH sector offering advanced audience metrics, how do you see the metrics contributing to the DOOH advertising growth? Are media planners showing a greater preference for DOOH in their plans?

Even in Japan, the biggest issue for the OOH industry is the lack of usage of the unified metric that compares the value of each OOH advertisements (currently the guideline was issued by the Digital Signage Consortium, but it is difficult for all media owners to prepare the data by themselves or to find the data provider). Also, there is no unified metric for comparison with television and digital excluding LIVE BOARD.

LIVE BOARD is the only Japanese company that realises nationwide VAC based on global standards. For impression measurement, we have developed an appropriate method for environments such as outdoors, stations, in trains, and stores. We succeeded in calculating its reach and frequency, and also succeeded in developing a simulation of an optimal budget allocation with TV and digital. Global advertisers and Japan's top advertisers, who value accountability, and agencies who engage in them will adopt our approach, just like TV and digital planning.

Finally, the Japanese DOOH market will definitely grow. However, LIVE BOARD has evolved too much at once, so it will take some time for it to penetrate.

Are planners, advertisers and buyers seeing value in programmatic DOOH buying? Does this work for both place-based networks and iconic and large format DOOH?

To be honest, at the moment, I don't feel that advertisers, agencies, and media owners expect an OOH world that can be bought at an auction in Japan. However, buying through DSP is becoming a common method for global agencies and major Japanese agencies which are undergoing digitalisation, so they are finding value in it. The DSP ratio in LIVE BOARD is at about 20%, but it is still low in the entire OOH and DOOH markets in Japan. We need to enlighten the benefit of it, but it is also a problem that Japanese media owners and agencies engaged in OOH put importance on human relationships and have a low awareness of "efficiency". In the world of programmatic OOH, we think that the place-based networks sold with data are more suitable than iconic and large format DOOH sold without data, but even iconic and large format DOOH will rely on us if sales are sluggish.

Studies show that DOOH delivers best when planned along with TV or digital. With adtech solutions, is there greater scope for such integrated plans?

LIVE BOARD has conducted nearly 500 post-buy campaign analysis in the four years since its establishment. Among them, (1) "feeling popular effect" to increase "purchase/usage intention", (2) increasing the interest and usage intention of users who love competitor's brands, (3) boosting the effect of TV and digital, (4) recognition of teens and 20s (Generation Z) (5) immediacy effect and store visit effect, etc. have already been visualised in the data. Effectiveness is quantitatively measured using industry-uniform metric, making it possible to propose optimal media allocations that are more effective with the same budget to advertisers and agencies. These will open up the possibility of a more effective integration plan.

Do you see a global ecosystem taking shape for DOOH, and would LIVE BOARD look at expanding your business footprints across geographies?

LIVE BOARD has a unique presence in Japan with three aspects: (1) media owner, (2) platform distributor, and (3) advertising sales, centred on mobile data. In the global market, Hivestack, our partner, a global platform company from Canada, is connected to 25 countries around the world, and in-out and out-in business is already possible through DSP.

Out-In business is a 600% increase from the previous year. We anticipate that in-out needs will emerge in the next fiscal year. We want to be the one and only player that connects Japan and the world. Regarding the overseas expansion of the LIVE BOARD business, fortunately, various overseas companies have approached us to collaborate, but it is not easy to satisfy mobile data + the three aspects in other countries, so it is up to our partners.

A Trans-Atlantic DOOH network

OOH media operators Ocean Outdoor and Branded Cities have extended their long term partnership and launched a new super premium network.

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OOH media operators Ocean Outdoor and Branded Cities have extended their long term partnership and launched a new super premium network. The United brings together four premier digital advertising screens in the top three locations across three key global cities in the UK and the US.

The United gives advertisers exclusive access to London's iconic Piccadilly Lights, Los Angeles' The Moxy and Times Square in New York's TS2 (Nasdaq and Midtown Financial) in a way that has never previously been available. It includes a 30-minute, simultaneous domination played out at 1:30pm LA time, 4:30pm in New York and 9:30pm GMT in London and is designed to provide maximum impact for global film, entertainment and product launches.

The United will be a strictly limited opportunity, only available to a single advertiser once a month due to the highly demanded nature of these locations.

The United will incorporate the latest DOOH technologies and formats including Deepscreen™ and Dreamroom 3D capabilities and include a range of social amplification tools that aim to drive the combined estimated 14 million physical audience into a global digital audience with a proven extended audience of tens of millions on social media, a phenomenon that has seen DOOH become a central element for brands digitally and via popular social sharing channels.

The United will be available to buy from both the Ocean and Branded Cities sales teams.

Nick Shaw, chief revenue officer of Ocean Outdoor, said: "Digital out of home has become the lead media channel for big branding messages across the globe. Nothing can touch it in terms of the heady combination of reach and creative impact. The United delivers the very best of both for brands wanting to drive fame, saliency and build brand equity – the key functions of brand advertising."

Denise Levine, chief revenue officer of Branded Cities, said: "The ability to activate award-worthy campaigns across two countries in three major media markets in real-time speaks to the power of the partnership between Ocean Outdoor and Branded Cities. The United will provide brands with unparalleled reach on a global scale while delivering a memorable and one-of-a-kind experience for audiences."

To celebrate the launch of The United, Ocean Outdoor and Branded Cities have launched a microsite to provide advertisers and agencies alike an engaging look at the premium network ***www.the-united.info***

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Disney+
Welcome to Chippendales
tWes

Premiering 'Welcome to Chippendales'

The activation saw larger than life bare chested dancers performing a series of signature moves on a nightclub floor

Disney+ marked the UK premiere of its true crime saga 'Welcome to Chippendales' with a sizzling 3D out of home showcase across 11 Ocean Outdoor screens including the iconic Piccadilly Lights in London.

The activation saw larger-than-life bare chested dancers performing a series of signature moves on a nightclub floor, disappearing before their tantalising trademark finale.

The anamorphic sequence, which featured 'Welcome to Chippendales' actors Kevin Mylrea, Quentin Plair and Mikey Graceffa, was shot before a blue screen and warped to create a 3D illusion using Ocean's Deepscreen™ technique.

The DeepScreen™ spot is dominating large format DOOH screens in Westfield London, Westfield Stratford City, Manchester, Birmingham, Nottingham, Liverpool, Norwich, Glasgow and in 3D in Canary Wharf London for the first time.

The OOH showcase formed the centre piece of a UK wide cross channel media campaign supported by multiple touchpoints including TV, social, digital, radio and digital audio. Planned by Publicis Imagine, the campaign ran for three weeks until January 22.

Jonathan Burgesson-Carter, Content Marketing Director, Disney+ said: "We're thrilled to be working with Ocean who have been able to bring a unique show like Welcome to Chippendales to life in such a dynamic, immersive and exciting way through their Deepscreen™ format. The creative has turned out even better than we thought and we're so excited to see it live after all the hard work."

Tamina Plum, Managing Director, Publicis Imagine EMEA said: "We are extremely excited to launch another ground-breaking series for Disney+. Not only will this campaign be a Disney first with Ocean for the national DeepScreen™, but also a media first at Canary Wharf. We look forward to seeing how this execution pushes boundaries in an unexpected way for Disney to delivery on changing perceptions – It's true, Welcome to Chippendales really IS on Disney+."

'Welcome to Chippendales' tells the story of Somen "Steve" Banerjee, an Indian immigrant who became the unlikely founder of the world's greatest male-stripping empire. The series details the darkly comedic, crime-ridden tale behind the unique male revue that became a cultural phenomenon as Banerjee sought to fulfil his American dream.

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Clear Channel Singapore launches into Decentraland Metaverse

With the rise of immersive technologies like VR/AR, the metaverse is becoming one of the most exciting frontiers for brands planning to stay ahead of the curve

Clear Channel Singapore announced its partnership with LandVault to bring its services into the virtual realm, Decentraland. Clear Channel Singapore is the first and an exclusive partner in the region to launch OOH packages that will allow businesses to reach consumers in a new and potentially untapped market.

With the rise of immersive technologies like virtual reality and augmented reality, the metaverse is becoming one of the most exciting frontiers for brands planning to stay ahead of the curve. Clear Channel will have formats available in virtual public spaces within Decentraland where they get to create immersive experiences.

The areas within Decentraland Games include games such as ICE poker and Diamond Hands City, the busiest areas that account for more than 60 percent of all traffic. Individuals visiting these areas play games for two to three hours per day, with more than 60 percent of them being returning visitors. The ad placements are all natively integrated with the venues. This enables both brand advertising spots and the teleportation of visitors to the advertisers' URL or through an e- commerce store to drive engagement or transaction. The packages that are available will allow brands to connect the virtual experience to the physical world, with real-life assets.

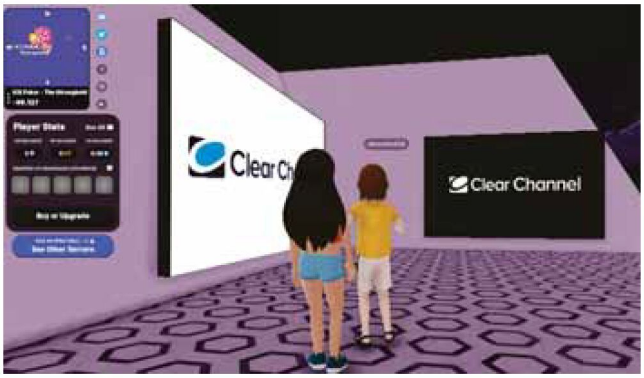
LandVault is the largest builder in the metaverse; with over 120 full-time builders and completed 200+ builds for some of the world's largest brands including Mastercard, Standard Chartered, and Heineken.

They are now integrated with top metaverse platforms like DecentraLand and Somnium Space, and the inventory can reach over 75% of audience in several metaverse venues.

"The partnership with LandVault has allowed us to incorporate the virtual world alongside the physical world, with interoperability between them. Just as how consumers make credit card transactions at physical stores, they can do the same with their virtual wallets to pay for an experience or purchase wearables in Decentraland," says Kelly Khoo, Chief Executive Officer, Clear Channel Singapore.

"We are providing a first-mover advantage for brands who want to get onboard the meta journey and gain early adopters," she adds.

"We've always had the intention of bringing brand experiences to the metaverse with our In-Play technology, and through our partnership with Clear Channel Singapore, we're able to achieve just that. This partnership is super exciting, not only because it's another step forward for brands to reach a nascent audience, but also because it's pushing the envelope for what's possible in advertising," says Samuel Huber, Founder & Chief Executive Officer, LandVault.



Broadsign launches its next-gen OOH platform

The platform offers unified user interface (UI), new flexible audience-targeting campaign tools, and expanded static access to help media owners work more efficiently and expand revenue opportunities

Leading OOH technology developer Broadsign announced its next-gen OOH platform ahead of Integrated Systems Europe (ISE), to be held in Barcelona, Spain on January 31-February 3, 2023. Designed to help OOH media owners enhance business management, operations, and scalability, the reimagined platform includes unified access to existing Broadsign product subscriptions, audience-based campaign targeting, and expanded static signage operations. ISE attendees can preview these advancements at the Broadsign ISE Stand (6H300).

A unified notion of inventory, audience & campaign management

The updated Broadsign platform boasts a new user experience that brings inventory and audience management for digital screens together and centralises access to Broadsign product subscriptions, starting with Broadsign Direct and Broadsign Reach. With these enhancements, OOH media owners will now have one centralised hub where they can sell ad space, automate yield optimisation, manage digital inventory and audience metrics, and advance their programmatic strategy.

New OOH ad server

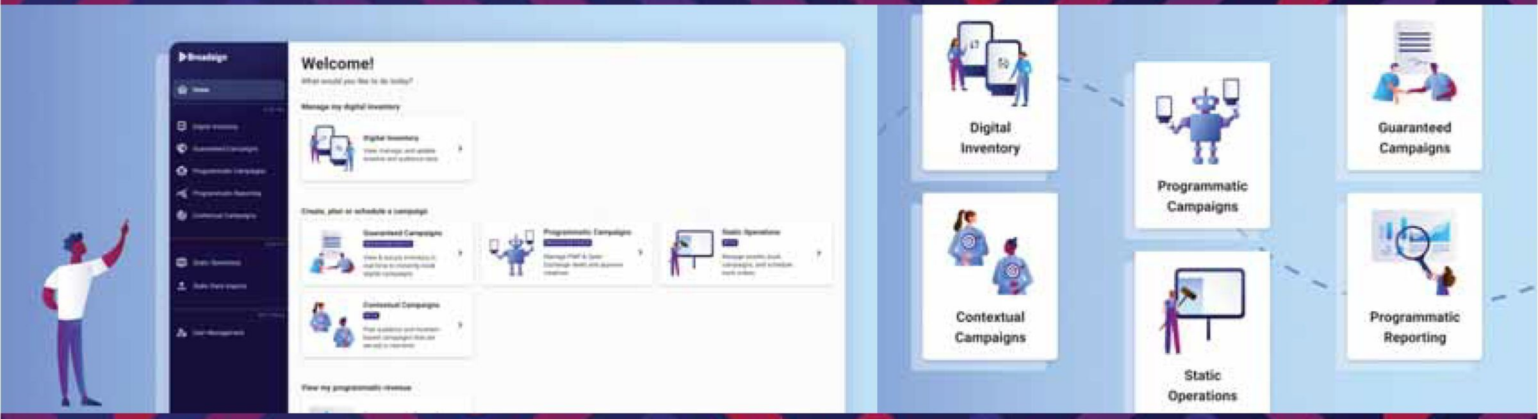
Broadsign's new OOH ad server lets media owners get more granular and plan campaigns based on specific audience demographics and contexts. It arrives as the demand for campaign flexibility, and more sophisticated targeting continues to grow and will make it easier for media owners to serve campaigns based on real-time conditions like weather, financial market shifts, points of interest, and more. The new ad server is expected to be launched in February 2023 in beta.

One home for digital, programmatic, and static

Building off Ayuda's rich static OOH experience, a new enhancement coming later this year expands platform access to static operations for current customers using the Broadsign Platform. It will consolidate static operations, such as campaign charting, real-time stock levels, creative management, and scheduling work orders.

"Between OOH's continued programmatic advancement and the increasing digitisation of screens, the OOH industry has grown more complex, and we're continuously evolving our product portfolio to ensure our clients can thrive in a dynamic landscape," shared Broadsign Director of Product Marketing Sabrina Allard. "The first update we're showing at ISE is just the tip of the iceberg, and we're excited to bring clients additional features that will give them more agility to launch new products and services, and unlock new revenue opportunities."

"Broadsign's platform evolution is a game changer in that we can use the same inventory source for both direct and programmatic sales. It's straightforward to use, provides a more holistic view of our available digital displays, and connects campaigns sold direct with our programmatic campaigns," shared Anna Ek, an early adopter of the evolved platform and commercial product owner, programmatic and ad ops for Scandinavia, Clear Channel Sweden. "We can easily add, update, and manage our inventory or set new screens live from one central hub, which saves us time and helps ensure all our data is updated at the right time."



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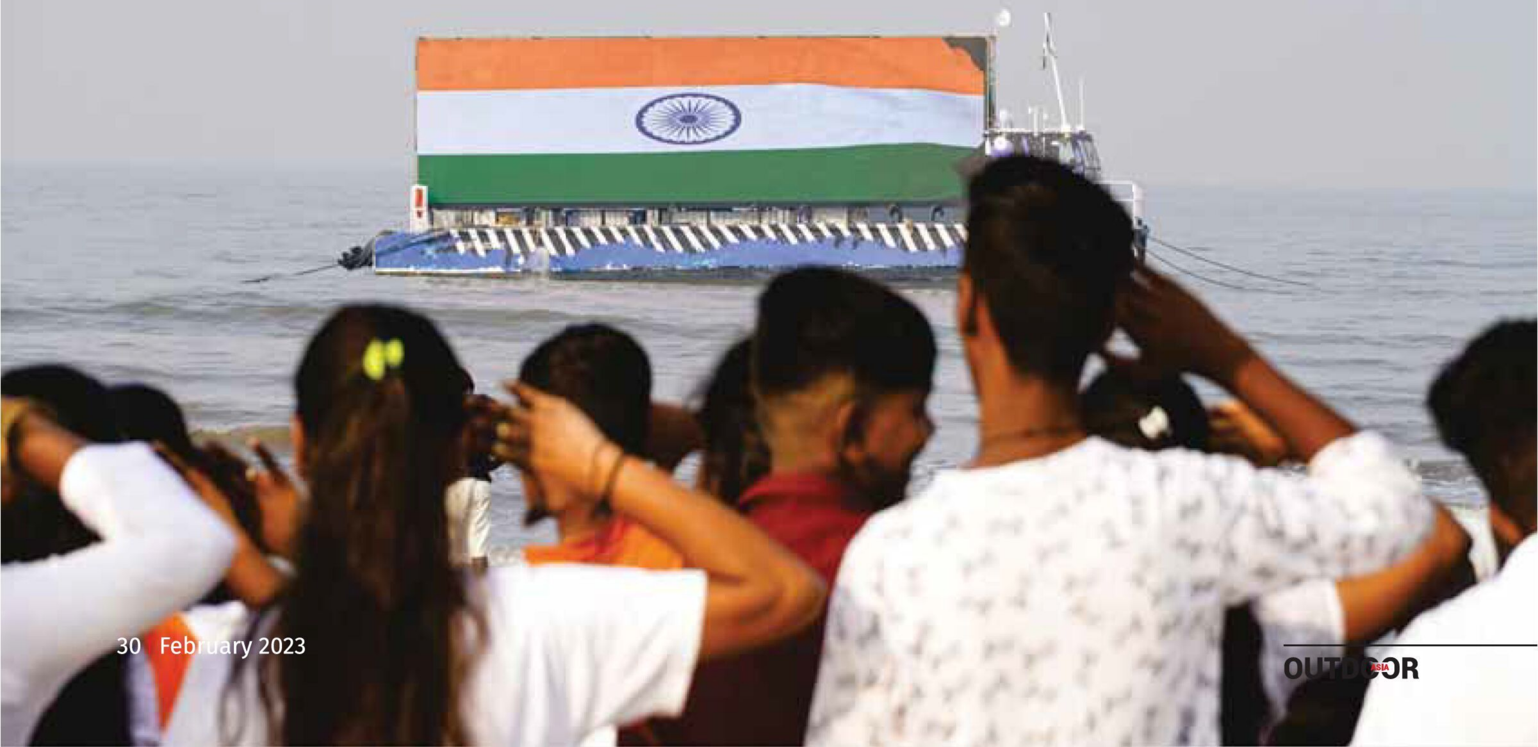
‘Broadcoasters’ backdrop for Republic Day celebrations

Mumbai Police actively participated in the celebrations

Mumba-based Zen Digital Media organised a unique celebration of the Republic Day at the Juhu Beach where Mumbai Police and people in the neighbourhood came together to watch the live broadcast of the Republic Day celebrations in the national capital. Zen’s ‘Broadcoasters’ media was digitally draped with the National Flag.

The Mumbai Police, who have been actively supportive at promoting helplines and awareness on the topic of Domestic Violence through this media company also decided to join along in a force of 50 – with over 30 officers coming from the Santacruz and Juhu police stations.



Lighting the darkness on Holocaust Memorial Day 2023

Rankin, Piccadilly Lights and BFI IMAX lead the commemorations

Ocean Outdoor screens across the UK joined a national moment to mark Holocaust Memorial Day 2023. Leading the "Light the Darkness" commemoration were London's Piccadilly Lights and the BFI IMAX.

In a powerful 11-minute domination, the Piccadilly Lights in London displayed black and white portraits of four genocide survivors taken by the British photographer and director Rankin.

The subjects included John Hajdu MBE, a Holocaust survivor; Sokphal Din BEM, survivor of the genocide in Cambodia; Antoinette Mutabazi, who survived the genocide against the Tutsi in Rwanda; and Amouna Adam, survivor of the genocide in Darfur.

These were followed by 30 original drawings, by artists aged from as young as 10, of individuals affected by the Holocaust, genocide or identity-based persecution. They included portraits of Iranian teenager Nika Shakarami, civil rights pioneer Claudette Colvin, resistance member Gad Beck, the chemist Primo Levi, scientist Alan Turing and the late Fay Healey who came to England on the Kindertransport and became a much-loved school lollipop lady in Litherland, Merseyside. Her portrait is drawn by Cerys, aged 10.

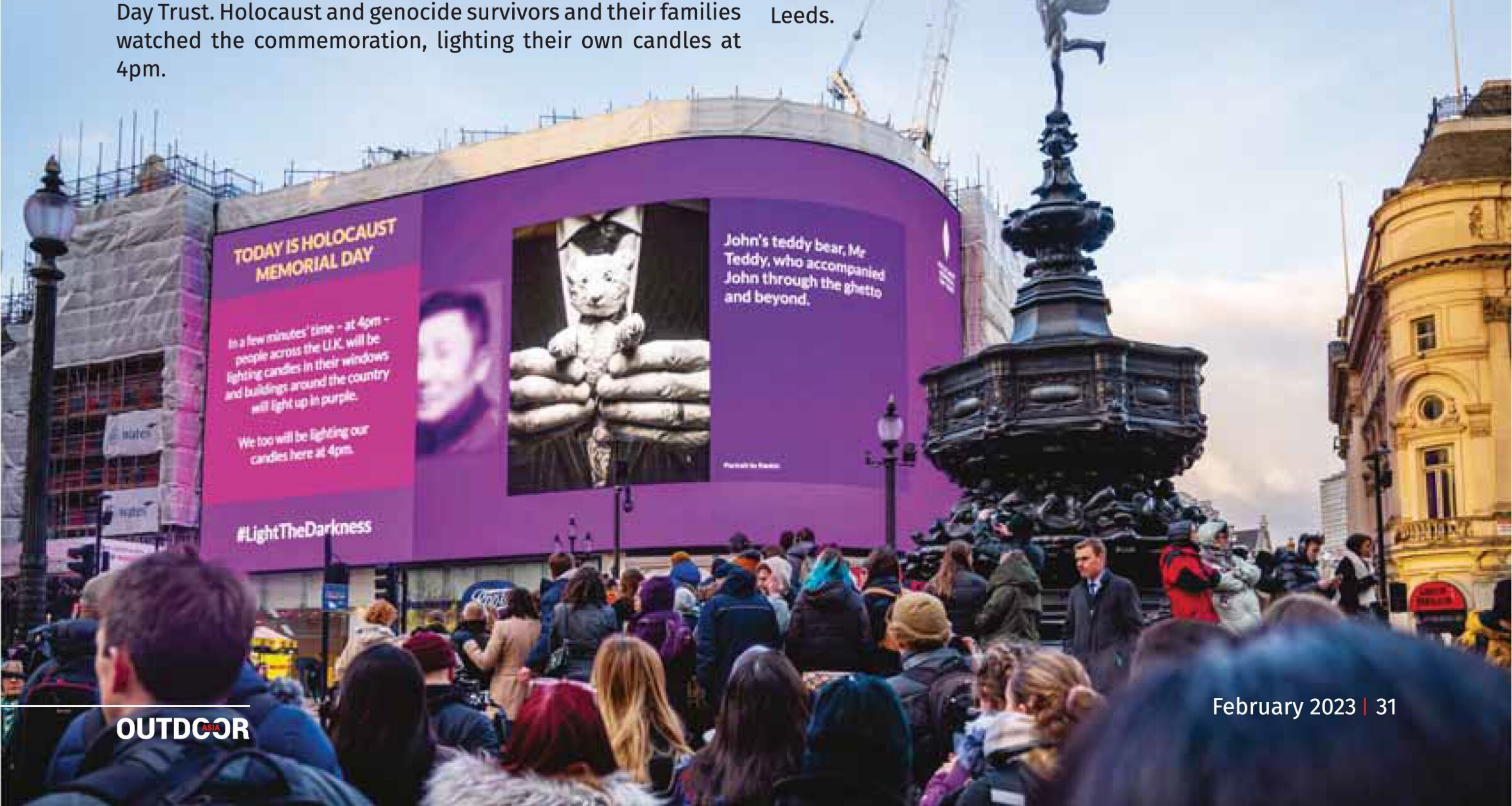
The space was donated by Landsec, which owns the Piccadilly Lights and the domination created by the Holocaust Memorial Day Trust. Holocaust and genocide survivors and their families watched the commemoration, lighting their own candles at 4pm.

Derek Manns, Commercial Media Director at Landsec, said: "Piccadilly Lights has become the national focal point for this annual act of remembrance which is both incredibly moving and powerful in its range and scope. We are privileged to be able to support such an important commemoration."

Ocean Outdoor UK CEO Phil Hall said: "Our participation in this annual commemoration reflects Ocean's purpose and role, using the power of our screens to support the communities where we have a presence."

The BFI IMAX in Waterloo turned purple for 60 minutes, joining more than 50 other national landmarks including the London Eye, Natural History Museum, Edinburgh Castle and Blackpool Tower.

Across the nation, messages also appeared on 10 Ocean DOOH screens in Birmingham, Liverpool, Newcastle, Manchester, Derby, Edinburgh, Norwich, Nottingham, Bournemouth and Leeds.


TODAY IS HOLOCAUST MEMORIAL DAY
In a few minutes' time – at 4pm – people across the U.K. will be lighting candles in their windows and buildings around the country will light up in purple.
We too will be lighting our candles here at 4pm.
#LightTheDarkness
John's teddy bear, Mr Teddy, who accompanied John through the ghetto and beyond.

OOH produces highest levels of consumer recall

Solomon Partners 2023 Benchmark Report Estimates for the US shows that almost half (49%) of adult consumers are noticing OOH ads more than one year ago as Americans return to normal lifestyles post-pandemic.

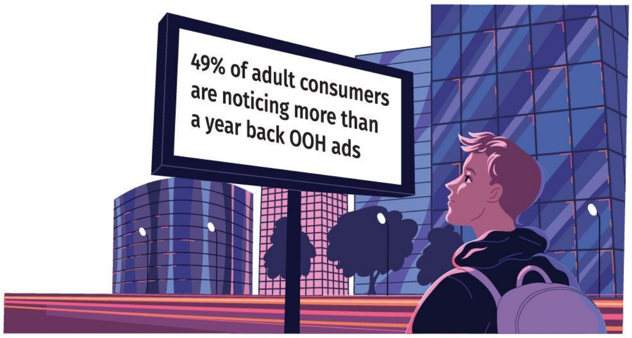
The Out of Home Advertising Association of America (IOAA), the national trade association for the OOH media ecosystem, has partnered with leading financial advisory firm Solonon Partners to release findings from the Solomon Partners' 2023 U.S. Major Media Advertising Effectiveness Analysis.

The analysis, which represents an aggregation of publicly available studies on advertising recall from 2017 to 2022, shows that OOH advertisements produce significantly higher ad recall with consumers versus live and streaming television, podcasts and radio, print, and online executions. This holds true across printed and digital OOH formats.

Confirming the importance of OOH in the media mix, Solomon Partners' analysis parallels recent findings from OAAA-Harris Poll research showing that almost half (49%) of adult consumers are noticing OOH ads more than one year ago as Americans return to normal lifestyles post-pandemic.

“This analysis affirms out of home's critical role in the media mix,” said Anna Bager, President and CEO, OAAA. “As the fastest growing media channel in 2022, this analysis from Solomon Partners is yet another proof point of the value that out of home brings to marketers at a time when people are fully re-engaging in their pre-pandemic lifestyles. Ad spend forecasts for 2023 reveal out of home will continue to outpace total media growth overall.”

“These benchmarking numbers demonstrate OOH's ability to engage consumers in a manner that typically outperforms competing media, and marketers should consider that effectiveness in their media plans,” said Mark Boidman, Partner and Head of the Media & Entertainment Investment Banking Group, Solomon Partners. “Generating higher levels of ad effectiveness is just one of the reasons OOH is generating greater growth than the overall ad market. The medium's digital flexibility and impressive increases in programmatic spend are driving the growth because OOH is delivering on the needs of today's brands.”


49% of adult consumers are noticing more than a year back OOH ads

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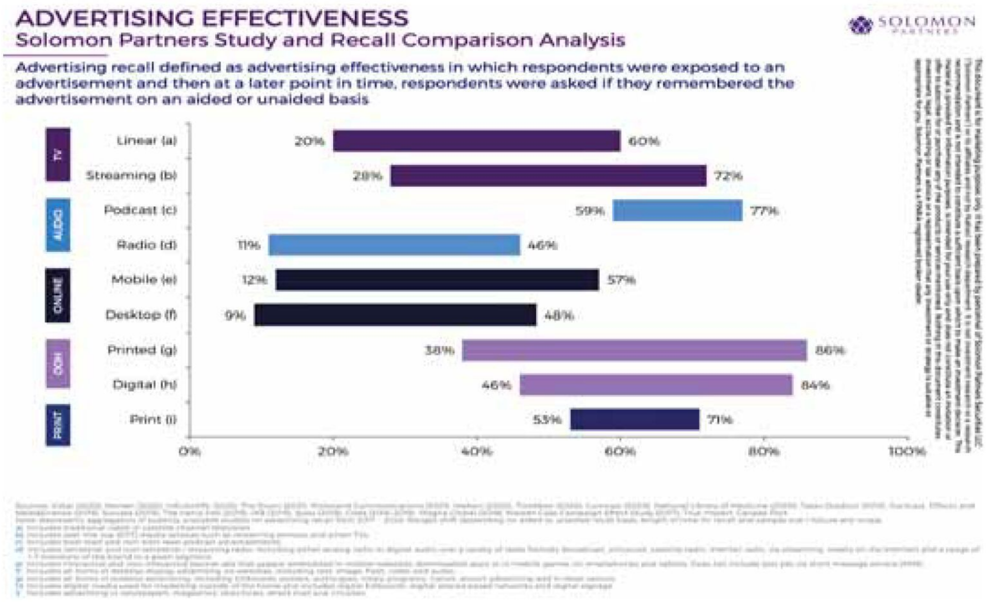


Australia OOH net media revenue at $1bn level

Q4 2022 saw 30.2% increase in net media revenue year-on-year, posting $329.7mn

The OOH industry in Australia has announced an increase of 27.6% on net media revenue for 2022, reporting $1,060.5 million, up from an adjusted figure of 831.1 million for 2021. This was posted on the Outdoor Advertising Association (OMA) website.

Quarter four 2022 saw an increase of 30.2% in net media revenue year-on-year, posting $329.7 million, up from $253.2 million* for quarter four 2021.

Notably, Q4 2022 exceeded 2019 revenue by 4.1%, the first quarter to exceed pre-pandemic sale

DOOH revenue accounts for 64.1% of total net media revenue year-to-date, an increase over the recorded 58.9%* for the same period last year.

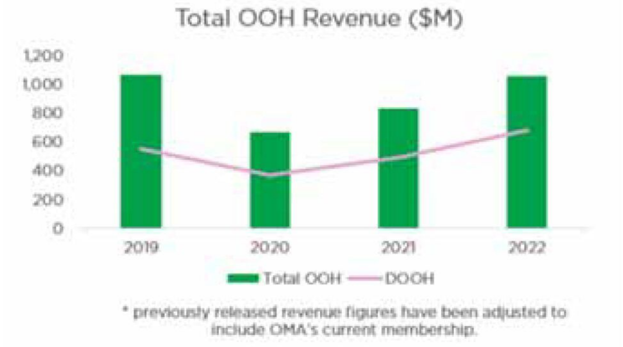
OMA CEO Charmaine Moldrich said, “The industry with its focus on clients and innovation has continued to develop tools including MOVE 2.0 to make it easier to transact Out of Home advertising and measure its impact. The industry has invested $15 million in MOVE 2.0 which will provide more granular measurement data, to be launched in 2024. We will be pushing into programmatic and automation this year, starting with the release of an industry Impression Multiplier. This will make it easier to transact programmatically, realising the power of real-time DOOH for clients.”

The outdoor industry is projecting an annual compound growth rate of 9% over the next four years. The forecast adds to PwC’s conservative projections with the industry’s knowledge of its continued investment in inventory, the launch of the new measurement platform MOVE 2.0, and the growth of programmatic buying.

“In 2022 the OMA launched a raft of tools making easier to plan and buy Out of Home campaigns. This includes the Neuro Impact Factor (NIF), a qualitative metric which goes beyond attention to measure the impact of Out of Home campaigns. The NIF is part of the upgrade of MOVE which allows for the measurement of digital campaigns; both metrics are supported by industry-wide standards.”

“These initiatives have undoubtably fuelled the wave of new members (16 in the last 18 months) bringing us close to representing a 100 per cent of the industry and being able to effectively project industry growth.” concluded Moldrich.

*Previously releases revenue figures have been updated to reflect changes in the OMA membership.



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Rajiv Raghunath, Managing Editor of Media4Growth and Outdoor Asia

Southern Matters

The southern OOH markets are shaped by strong economic fundamentals, growing urbanisation, a distinct demographic advantage, robust consumer trends, and a host of other enabling factors that were deliberated upon in the knowledge sessions conducted at the 1st South India Talks OOH conference held in Bengaluru on January 20. This report presents the key takeaways from the session.

By M4G Bureau

The 1st South India Talks OOH conference, organised at Courtyard by Marriott, Hebbal in Bengaluru on January 20, directed laser focus on the factors that makes the southern OOH markets a strong advertising destination. The conference, inaugurated by **Dr Anup Dayanand Sadhu, Chief Commercial Manager, South Western Railway, Shubendu Dutta, Director, Coral Media, C D V Subba Rao, Director, Prakash Arts, and Vasant Jante, Managing Director, VJ Media Works,** set the stage for focused presentations and discussions on the policy norms governing OOH, brand perspectives, media buying and media ownership, with particular reference to the southern OOH markets.

The knowledge sessions set off with introductory remarks by **Rajiv Raghunath, Managing Editor of Media4Growth and Outdoor Asia**. Citing that the southern states make up 30.45% of the national GDP while covering ~19% of India's geography, Rajiv pointed out that the 5 major states in the region figure among India's Top 12 state economies in terms of SGDP at current prices for the period 2021-22 (see Figure 1).

State	GDP at current prices (2020-21)	Rank (2020-21)	GDP at current prices (2021-22)
Tamil Nadu	18,08,23,943	2	20,65,43,628
Karnataka	17,30,99,141	3	20,49,37,896
Andhra Pradesh	10,14,37,379	7	12,01,73,552
Telangana	9,61,80,037	10	11,48,11,470
Kerala	7,99,57,111	11	9,01,99,783

Source: Reserve Bank of India

Referring to the demographics of the region, Rajiv cited that the southern states together have a total population of 27.03 crore or 19% of India's total population as at 2022 estimates. The five southern states are among Top 13 most populated states in India, as given in Figure 2.

Fig 2: Demographics – southern states

State	2022 (estimates) in cr	Rank
Tamil Nadu	7.66	6
Karnataka	6.72	8
Andhra Pradesh	5.3	10
Telangana	3.79	12
Kerala	3.56	13

Source: Census Population Projection report

Tamil Nadu, Karnataka, Kerala, Andhra Pradesh are among Top 10 fastest urbanising states as is cited in Figure 3.

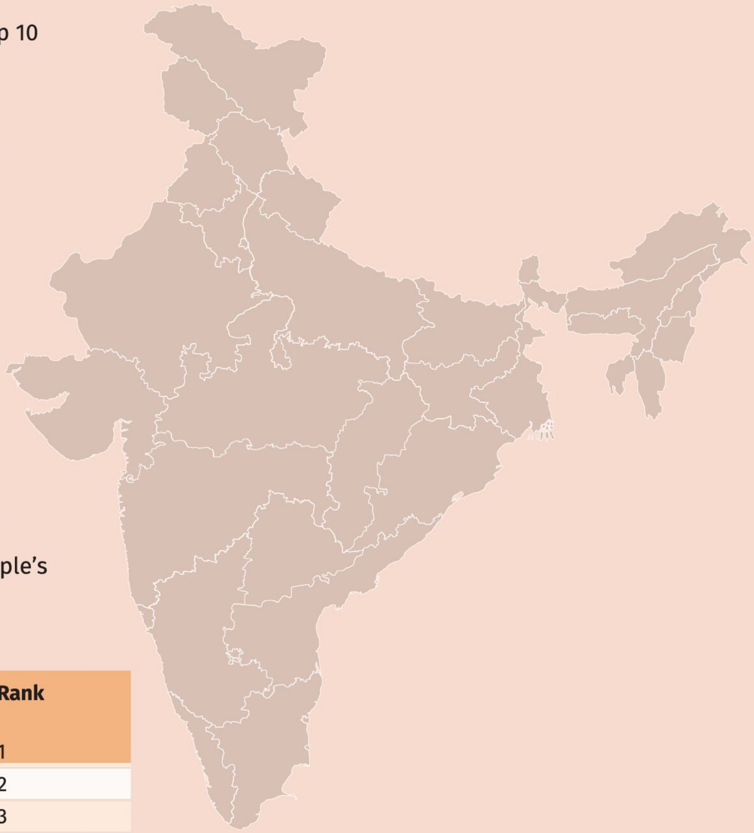
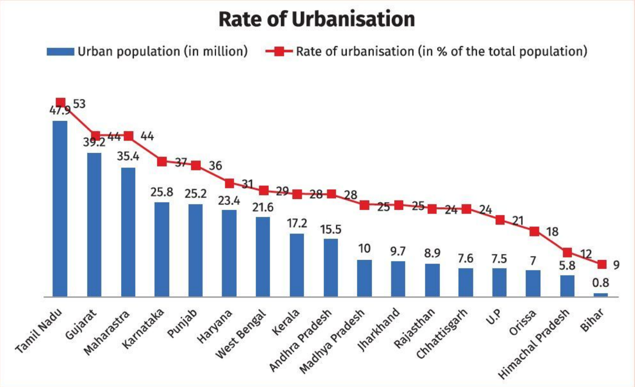


Fig 3: Pace of urbanisation



Also, the southern states figure among Top 13 in terms of people's purchasing power, as given in Figure 4.

Fig 4: Purchasing power

State	Per capita NSDP (at current prices (INR) in 2021-22	Rank
Goa	4,35,949	1
Sikkim	4,12,627	2
Delhi	3,56,151	3
Chandigarh	3,28,002	4
Haryana	2,40,507	5
Telangana	2,31,378	6
Karnataka	2,22,002	7
Andaman & Nicobar Islands	2,19,653	8
Kerala	2,13,041	9
Puducherry	2,17,138	10
Gujarat	2,12,428	11
Tamil Nadu	2,06,165	12

Source: RBI

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‘NINFRIS, e-auctions augment ease of investment in railway media’

***Dr Anup Dayanand Sadhu, Chief Commercial Manager, South Western Railway** spoke about the factors augmenting investments in railway media.*

Railway zones are once again stepping up the efforts to improve the non-fare revenue (NFR) earnings after having experienced a steady fall in these earnings in the past 3-4 years owing to attempted centralisation of NFR. In the case of South Western Railway, plans for station redevelopment also contributed to the dip in NFR inflows. Stating this in his Keynote on ‘Advertising media in Indian Railways’, **Dr Anup Dayanand Sadhu, Chief Commercial Manager, South Western Railway** said the ‘New Innovative Non-Fare Revenue Idea Scheme’ (NINFRIS) introduced by the Rail ministry is expected to attract greater private participation in NFR-centred activities.

NINFRIS-led projects are being awarded for a period of 2 years under the divisional railway managers and 5 years under the general manager. The contracts are awarded based on recommendations of the Evaluation Committee.

Dr Sadhu said the e-auction system has also simplified the process for the participation of bidders to railway projects. This system has not only helped standardise the eligibility conditions for projects across the zones, but also facilitates quick re-award of contracts on a case by case basis. Besides, the e-auction help the Railways to break any cartels formed by bidders.

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‘OOH ideal for building public awareness of Govt schemes & programmes’

***Siddalingappa B. Pujari, Managing Director, Karnataka State Marketing Communication & Advertising Ltd** shares his perspectives on ‘How OOH can be pivotal to Govt communications outreach’.*

OOH is very important medium for the government to relay its messages on various schemes and programmes to the public. Stating this in his presentation on the theme of ‘How OOH can be pivotal to Govt communications outreach’, **Siddalingappa B. Pujari, Managing Director, Karnataka State Marketing Communication & Advertising Ltd** said that OOH is an ideal medium to create a strong brand recall in the minds of people. He pointed out that brand recall created via OOH is about 52% compared to some 30% on television.

While highlighting the role of OOH in building visibility for various government-led events such as conferences and cultural events, Siddalingappa said that the medium’s capability to render and deliver multiple creatives with localisation of content makes OOH a true impact media.

He underlined the fact that DOOH is crunching the time between an order placed and display of the advertisement.

Karnataka is among the top five states spending on OOH advertising, he said.

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‘Hyperlocal marketing reinforces relevancy of brand communications’

Mr Senthil Kumar, Chief Business Officer of Dindigul Thalappakatti, *talks about the growing importance of hyperlocal advertising as brands seek to connect with relevant audiences.*

Drawing his experience from having worked for 25 years across luxury fashion, value fashion, saloon and now food businesses, **A Senthil Kumar, Chief Business Officer of Dindigul Thalappakatti**, shared his perspectives on the theme of **‘Leveraging OOH for hyperlocal advertising -- key success factors’**. He observed that hyperlocal marketing, which is narrow focused marketing targeting customers where they are, has gained greater momentum since the pandemic outbreak.

As the world moves from “reach to relevance”, hyperlocal marketing gains increasing importance. It’s about brands reaching relevant consumers, he stated. Further, hyperlocal marketing is about making relevant content that helps bring customers to the doorstop of a brand’s outlets.

Hyperlocal marketing is not just about communicating to consumers, but about establishing a brand connect with them. Today, when media channels like digital are focusing on ‘near me’ options, the imperative of going hyperlocal with marketing becomes all the more critical for various brands.

That apart, hyperlocal marketing is expected to bring about immediate response and delivers relatively higher RoI to advertising brands.

Senthil spoke about his brand’s initiative to run ‘biriyani eating competitions’ that create deep consumer engagement. “When I do these kind of competitions the revenues at our outlets go up some seven-fold,” he said.

‘Selfie with Thalappakatti’ was another hyperlocal marketing initiative that contributed to greater customer loyalty, said Senthil.

A few aspects to be looked into while building a hyperlocal marketing strategy are: 1) identifying the target audience, 2) planning what to communicate, 3) positioning to product as per the communication plan, 4) creating the campaign, 5) and choosing the right medium for the communication, and 6) right execution of the campaign.

That said, often infrastructure bottlenecks could pose some challenge in executing a campaign. Moreover, there could be certain regulatory restrictions for such activities that need to be kept in view when executing the campaign. “A micro level understanding of the market,” is another key success factor, he said, while adding that innovative ways to collaborate with the local community will also contribute to the overall success of such an initiative.

Senthil asserted that hyperlocal marketing is also yielding significant business to agencies. Agency need to look at building strategies to target “customers around you”. At the same time, the agencies need to be cognizant of the fact that hyperlocal marketing is cost-intensive and currently this segment is largely ‘unorganised’.

Hyperlocal marketing has relevance for tourism promotion, said Senthil, while adding that worship places, corporate campuses, residential complexes are places where hyperlocal brand activation could deliver high RoI.

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‘OOH has an instrumental role in impactful brand communications’

Sanjay Kumar Jariwal, General Manager – Media Buying, Prestige Group & Vipul Mishra, Head – Strategic Alliance & Brand Partnerships, Paytm *share their viewpoints on ‘Placing OOH in brand plans for southern markets’*

Prestige Group runs project-specific campaigns, and rarely undertakes any brand campaigns. Stating this in his presentation on theme of **‘Placing OOH in brand plans for southern markets’, Sanjay Kumar Jariwal, General Manager – Media Buying, Prestige Group**, said that OOH makes a huge

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TALKS OOH

difference to real estate brand's last mile connectivity. Prestige has been advertising on particular billboards for years, said Sanjay, while adding that OOH facilitates effective communication with people living in and around the brand's project area.

Sanjay underlined the scope of innovation that OOH offers, and said that makes this medium so much more relevant to real estate brands. He also referred to the group's success in running a digital media campaign in tandem with OOH promotions, in Bengaluru and Hyderabad.

In the pandemic period, the Group launched high-end residential projects that got sold out in a short span of time, and the only media channel that Prestige used was OOH, said Sanjay, while adding that the combination of digital media and OOH has helped the brand to find ready market for its luxury villa project.

Site branding is another important factor contributing to a real estate project's success, he said.

Sanjay pointed to the effectiveness of large format OOH advertising, and also asserted the need for a common currency for this medium.

Vipul Mishra, Head – Strategic Alliance & Brand Partnerships, Paytm in his presentation highlighted how OOH has helped to brand to run tactical communication and also amplify its Indian origin.

Vipul said that in the current year Paytm would be looking at stepping up its hyperlocal marketing through micro-targeting. Transit media is another key option for the brand. While OOH is a 4-second, innovation makes it more lasting, he said.

In the panel discussion, moderated by Rajiv Raghunath, Vipul said, "I consider OOH as a medium that is capable of delivering the right impact.". He concurred with Sanjay's view that OOH works well in combination with digital media.

With a hyperlocal OOH campaign, the brand is able to see the impact in terms of a spike in transactions on the Paytm platform.

Sanjay pointed out that large formats like billboards and media like gantries in uncluttered environments delivers strong business results for real estate brands. OOH is visible round the clock, that no other media can ensure.

Responding to the industry's concern on brands' procurement teams taking the call on media buys based on price points alone, Sanjay explained that their corporate communications team takes the requirements from the sales teams, makes the budgets that are duly approved, and only then the media is bought.

Vipul said the marketing team invariably guides the commercial team on why particular sites are important for a campaign's success.

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INITIATIVE

'Let the creative juices flow'

***Srinivasan Subramanian, Executive Director of Koncept Ambience** shines the light on how problems and day-to-day issues can be used as levers to craft high impact campaigns*

Srinivasan Subramanian, Executive Director, Koncept Ambience presented a series of spectacular and advertising campaigns and creatives like the 'vertical soccer' display on a billboard in Tokyo that resulted in $150 million worth of free publicity for the brand adidas. The innovation was planned by TBWA.

Srinivasan referred to the unique Lifebuoy campaign at the Maha Kumbh in 2013 attended by over 100 million devotees where the brand served rotis to the people there with a message imprinted on each roti reminding them 'to always wash hands before one eats food'. The imprint was created by using hot iron grill. Over a period of 30 days, the Lifebuoy team stamped some 2.5 million rotis that were served at the Kumbh.

Likewise, Vodafone presented devotees at the Kumbh with branded padded ear cover accessory with a radio that played devotional songs. The accessory brought much relief to the devotees in the harsh winter season in the northern region.

In his concluding remarks, Srinivasan said that today creative professionals have made disruption a part of their daily work.

Non-metro OOH markets have the potential to attract higher ad spends

However, in the absence of a common currency for audience metrics, and lack of customised media packages, especially for DOOH, 'The Southern Advantage' may not be fully leveraged.

OOH advertising has been predominantly urban-centric but as the non-metro and rural markets grow, advertising categories like FMCG and micro-finance are increasingly looking to step up their OOH ad spends in those markets. Stating this in a panel discussion on 'The Southern Advantage', **Jayesh Yagnik, CEO, MOMS Outdoor Media Solutions** said a brand like Asian Paints has run campaigns across some 800 cities and towns, with the southern region alone seeing 300 places being covered. The particular requirements of a brand, and the target audience that they have in view determine the ad spends allocated for particular cities and towns, he reckoned.

Typically, most brands would aim to build their market presence in Top 8-10 cities, but if their distribution networks are more widespread, infrastructure development is more developed, and more media options are available, they will be open to reaching out to more cities with their brand campaigns, said Jayesh, while adding that over the next five years he expects the share of semi-urban and rural markets in the overall OOH ad spends to grow substantially.

Speaking about OOH advertising in the southern markets, Jayesh said the region attracts about 15% of the total ad spends, although the southern India population is more than a quarter of the country's population. There is therefore significant scope of increasing the ad spends in the southern region, he said. Currently, the spends are proportionate to the percentage of working professionals vis-à-vis total population in the region, he pointed out.

FMCG brands in particular have a sharp focus on the southern markets, said **Shalini Sankar, National Head – Business Development, Laqshya Media Group**, while pointing that as a greater number of working professionals fanned out to the Tier 2 cities in the Covid period and started to work in hybrid environments, the FMCG demand also got an even spread across more cities, and that meant the FMCG brands would also expand their reach across more non-metro cities. As such, FMCG brands tend to focus a lot more on women as TGs. As the southern states have a higher percentage of working women, the FMCG brands have HAD a greater reason to step up their visibility in those markets.

Retail and startups are among the other major advertising categories in the southern region, said Shalini, while also stating that often times availability of media is a constraint in many of the non-metro markets even as brands are looking to build their presence in cities and sub-regions like Hubbali-Dharwad, Mysuru, Rest of Tamil Nadu (ROTN), etc.

When asked how **Coral Media** engages with regional brands, **Lekshumanan Annamalai, Founding Partner of this agency** said a micro-level understanding of the southern markets and close engagement with leading regional brands have stood the organisation in good stead. Lekshumanan added that Coral Media has worked closely with regional brands like Prestige even as they established their presence beyond the South, and entered other markets like Mumbai.

With robust audience metrics it would be possible for brands to look at building their advertising presence across more markets, said Jayesh. Until then, brands would look to take up strategically located media in major cities, whereas regional brands with ample budgets might look to have more media sites for their campaigns in the smaller cities. Jayesh stated categorically that the objective is to deliver to the brands value for spends.

Anil Hirani, Managing Director of Armour Digital OOH said the regional teams of national agencies would need to have a more granular understanding of what digital media, especially in the railway space, can deliver to the brands. He called for more dialouges between the agencies and media owners for creating that win-win proposition for buyers and sellers.

Jayesh said that while regional media owners would need to be better informed about buying DOOH media, the sellers themselves need to make customised packages that attract the attention of buyers and advertisers.

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The South India Talks OOH conference provided a singular opportunity for government officials, brand marketers, media owners, specialist agency heads and professionals, consultants and adtech solutions providers to engage in knowledge exchanges on the emerging OOH/DOOH business avenues in the southern region.

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EXIT

From Maharashtra to Milan: Campaigns that dotted the OOH-scape this month

From regional brands driving tier 2 OOH in Maharashtra and Mumbai Metro enhancing brand visibility for Goldmedal Electricals, to an iconic artistic creation marking Pikasso Italia's launch of its 'Milano Collection' of large formats in Milan, it's been an interesting start to the year for OOH. Here's a look.

Mapping the Regional OOH journey

How Aurangabad wears OOH on its sleeve

The growth of tier 2 and tier 3 and be best gauged by the number of brands present in their ad spaces. Aurangabad, with a population of 1.2 million (Census 2011), is seeing faster industrial growth, in areas like manufacturing, biotechnology, pharmaceuticals and automobiles, etc. The industrial growth is contributing to income and employment growth in the city, that in turn has a positive impact on the consumer market, as well as brand advertising. It's no wonder that the city is seeing robust OOH advertising, powered by regional brands, and with the participation of select national brands. A drive through the streets of the city showed the strong presence of regional brands like Jovees Herbal, Vitoba Herbal Toothpaste, IIB, RCC, Sakaar, Eeken, Vikram Tea, and AK Physics on the large formats. Also, visible were larger brands like Vicco Toothpaste, SBI, Nissan, Ather, and Croma.

While OOH markets like these are not often beeping on the radar of major media buyers and advertisers, the media operators would also do well to improve the quality of media presentation and make the attempt to highlight the distinct advantage that OOH offers to brands seeking to connect with the consumers in Aurangabad.

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Nashik on the OOH fast lane

The other important Tier 2 city in Maharashtra , Nashik, is the fourth largest city in the state, after Mumbai, Pune and Nagpur, with a population of over 1.5 million people, and is a vibrant OOH market that again sees high participation of regional advertising brands. The city that sees the Maha Kumbh once every 12 years, has a strong industrial base with several large companies having their production units.

Nashik is also known for its festivals, and is a tourism destination. Investments are growing in the IT sector. The current season sees a gamut of brands actively running their campaigns across the city, with the prominent brand categories being, school and education services, real estate, clothing and jewellery.

Brands that were particularly visible on the OOH landscape are: Delhi Public School, Ashoka Group of Schools, TrueTeachers, Fravashi, Amar Apex, Omkar, DJ Builders, Decathlon, Tyzer, and Pohumal Jeweller.

As the OOH business gains momentum in the current busy season, the media owners are also embattled with rising tax burden that requires collective efforts to prevail upon the city regulators to usher in a more friendly regime for the media operators. At the same time, the city landscape calls for initiatives to declutter the displays and bring in a system for improved showcasing of the brand campaigns.

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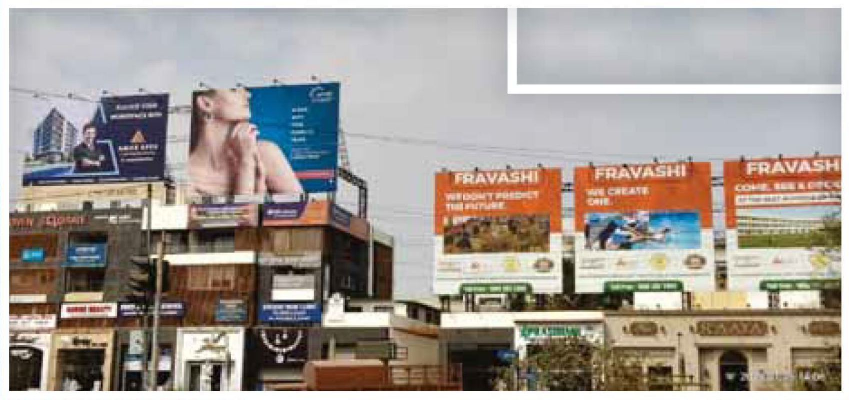
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KASHI BALLOON & BOAT FESTIVAL
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When Kashi soared high, quite literally!

Varanasi witnessed a unique Kashi Balloon and Boat Festival which was held in the city during January 17-20. The festival was conceptualised to celebrate Kashi being declared as the first global cultural capital by the international grouping SCO (Shanghai Corporation Limited) which has countries like Uzbekistan, Kyrgyz Republic, China, Pakistan along with India, and to mark the arrival of delegates into Varanasi for their annual coordinators meet.

Sharing his comments on the event promotion, Kaushal Raj Sharma, Commissioner Varanasi, said “ancient traditions of our country need to be packaged into authentic and curated experiences for the modern travellers”.

10 Hot Air balloons flew the delegates, global media and attendees over the sacred-scape of Varanasi's fabled ghats to give an aerial perspective of the ancient city for four days. Top balloonists from five countries flew over the ghats where the guests and the global media attendees could see the life-ending climactic rituals, Kashi's landlocked temple scape, and the dramatic throng of pilgrims taking their redemptive dips in the holy river. Samit Garg, the organising member and Founder, E Factor and Skywaltz said that it is critical to reimagine the tourism landscape of the country and create new niche products for premium travellers to provide thrilling perspectives of India's vast heritage capital. This was followed by a Boat Race League - to morph the traditional Nauka Races into an annual global sports tradition for the premium sports lovers to come and watch.

KASHI BALLOON & BOAT FESTIVAL
17TH - 20TH JANUARY 2023
KASHI BOAT RACE FESTIVAL

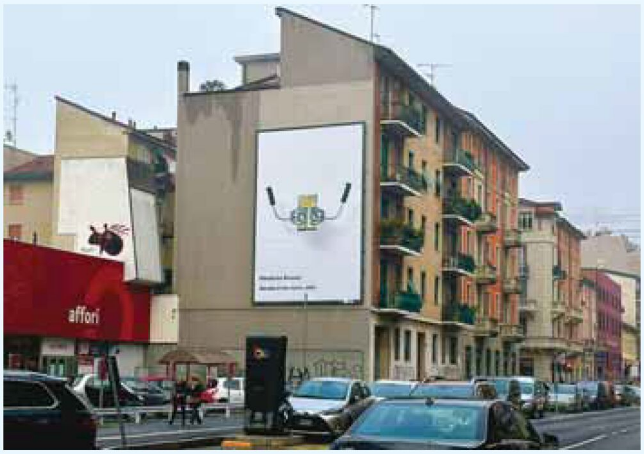
Global OOH: Milan's city-scape comes alive

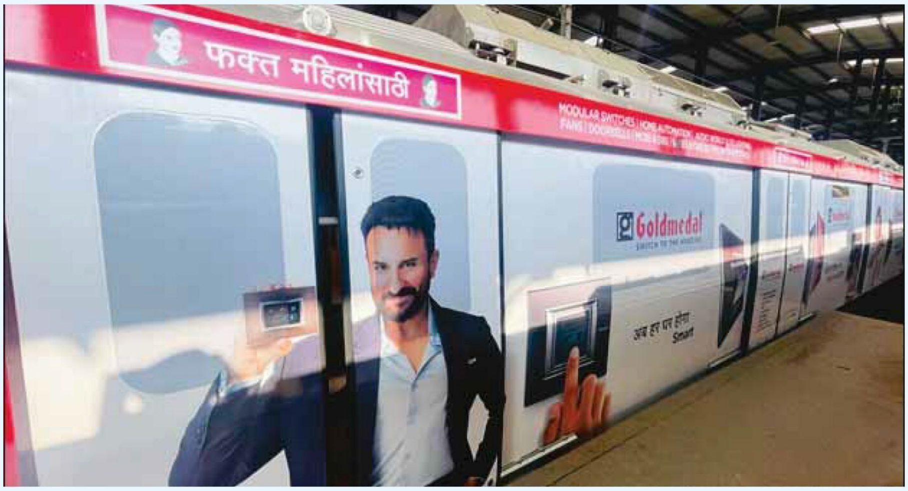
Artistic creation adorns Pikasso Italia's new large formats

When Pikasso Italia recently announced the launch of its 'Milano Collection' of Classic and Digital large formats, the company chose a symptomatic work by Elisabetta Benassi "Ascolto il tuo cuore, Città" (" I Listen to your heart, City ") to be displayed as the first campaign on the two walls of Via Quaranta, 12 and Via Pellegrino Rossi, 37 in Milan.On that occasion, Pikasso Italia A Pikasso Italia media note states that 'Ascolto il tuo cuore, Città' is a tribute to the City of Milan by artist Elisabetta Benassi inspired by Alberto Savinio's eponymous book and repurposes the practice, well rooted in Benassi's work, of the "objet trouvé" and its rewriting in terms of poetic potential. A copy of the first edition of Savinio's book is stuck on a strange rack to a bicycle handlebar, amidst the obvious reference to the means of daily transport and ironic anatomical & animal allusions."

Antonio Vincenti, Founder and CEO of the Pikasso Group and General Manager of Pikasso Italia said: "Art plays, as we all know, an essential role in our daily lives. We could not find a more contextually relevant work than 'Ascolto il tuo cuore, Città' for the launch of the Milano Collection Large Formats."

The 'Milano Collection' consists of two walls and two rooftops located on major traffic roads in the north and south of Milan.





Transit OOH: Goldmedal Electricals charged up by Mumbai Metro

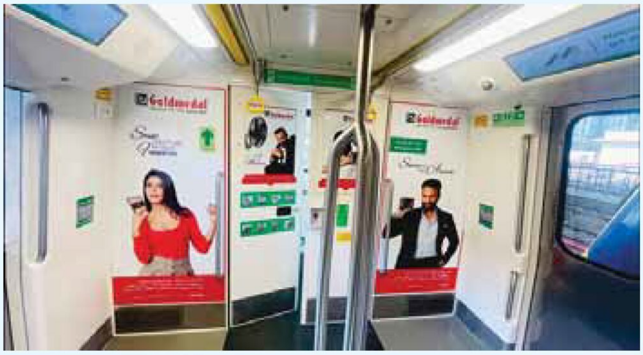
'Metro helps us reach our audience on a regular basis'

MOMS, the unit of Madison World, along with JC Decaux, recently executed a successful metro train branding in Mumbai for Goldmedal Electricals, one of India's leading electricals brands.

As part of Goldmedal's transit media debut in Mumbai, the brand boarded 3 metro trains with internal and external branding on Mumbai Metro Line 2A and 2B (DN Nagar to Anand Nagar) and Line 7 (Andheri East to Dahisar East).

In addition to connecting the Western Express Highway to the Western and Central Indian Railway Line, the newly constructed metro lines will provide excellent connectivity to the Western Express Highway. With large-scale train branding moving along the elevated corridor, it is a highly effective medium to reach audiences.

On the successful collaboration for the campaign, Kishan Jain, Director, Goldmedal Electricals said, "The metros have become a second lifeline for Mumbai city. At Goldmedal, we make products for almost every electrical need - having our branding on the metro trains helps us reach out to our audience on a regular basis. We are glad to say that the Goldmedal branding looks amazing on these trains, and I



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would like to thank everyone for executing this campaign in a timely manner."

"Associating with Goldmedal has been an exciting endeavour for the MOMS team," says Jayesh Yagnik, CEO, MOMS. "Goldmedal is a classic example of how aesthetics meet convenience. This is the culmination of our persistence, and we are thrilled to see it come to fruition."

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